

**How Much Can We Afford to
Keep?**

with Wayne B. Clark

UUA Large Church Conference

Louisville, Kentucky

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Workshop Goals

- **Introduce new vocabulary**
- **Share new stewardship development program, Forward Through the Ages**
- **Describe five phases of FORTH**
- **Present ABD component of each phase**
- **Questions and answers**

Workshop material is excerpted from

***©Beyond Fundraising:
A Complete Guide to
Congregational Stewardship***

by

Wayne B. Clark

**Now available at www.uua.org/bookstore
and 800.215.9076**

Accommodations?

New Vocabulary

_____NEW_____OLD_____

- **Financial commitment / pledge**
- **Integration / assimilation**
- **Annual budget drive / annual canvass**
- **Visiting stewards / canvassers**
- **Stewardship conversations/ home visits**
- **Orientation workshops / training**
- **Program spaces / classrooms**
- **Equal sacrifice / equal giving**

Appreciative Inquiry

- **An approach to growth that focuses on identifying what already works well and building on those strengths, rather than focusing on problems.**
- **Aims to create meaning by drawing from stories of concrete successes.**

FORTH

- **To emphasize connection between spiritual stewardship and congregational mission**
- **To provide resources for current programs and ministries**
- **To deepen commitment to future programs and ministries**

Five Phases of FORTH

- 1. Accepting**
- 2. Growing and investing**
- 3. Giving back**
- 4. Giving generously**
- 5. Applying recent learnings**

Five Components of Each Phase

- 1. Stewardship education**
- 2. Joyful giving**
- 3. Ministry and good works**
- 4. Annual budget drive**
- 5. Planned giving**

Phase 1: Accepting (p 56)

Stewardship Education

Develop formal programs and informal opportunities to expand congregation's understanding of stewardship

- **Teach ways to accept gifts**
- **Offer a money management workshop**
- **Sunday service: Gracious giving**

Phase 1: Accepting Joyful Giving

**Create a plan to grow the giving of gifts,
call, and spiritual vocation**

- **Curriculum to teach stewardship of self,
family, community, and congregation**
- **Focus on protecting existing resources
and nurturing growth**
- www.uua.org/re/curriculum/stewardguide

Phase 1: Accepting Ministry and Good Works

- **Teach an Appreciative Inquiry approach to spreading the good news**
- **Create a Sunday order of service series of inserts**
- **Highlight current programs and ministries**
- **Acknowledge all annual budget drive volunteers**
- **Celebrate completion of the budget drive**

Phase 1: Accepting Annual Budget Drive

- **Conduct orientation workshops for visiting stewards**
- **Schedule as many stewardship conversations as possible**
- **Supplement (and follow-up) with phone calls, e-mails, and letters**
- **Conduct a closeout meeting with annual budget drive leaders**

Phase 1: Accepting Planned Giving

- **Create a bequest recognition society**
- **Publish a list of charter members**
- **Ask charter members to share passion**
- **Develop planned giving mission statement**
- **Create and distribute brochure**
- **Prepare a list of local planning services**
- **Develop activities to recognize charter members**

Phase 2: Growing and Investing

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Annual Budget Drive

- **Conduct orientation workshops for all new visiting stewards and phone callers**
- **Schedule condensed workshops for returning visiting stewards**
- **Conduct as many stewardship conversations as possible**
- **Refine the process by applying experiences from Phase 1**
- **Conduct a close-out meeting**

Phase 3: Giving Back

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Annual Budget Drive

- **Conduct orientation workshops for all new visiting stewards**
- **Conduct condensed workshops for returning visiting stewards**
- **Identify donors who will be invited to participate in stewardship conversations**
- **Supplement with phone calls and e-mail**
- **Schedule a close-out meeting for leaders**

Phase 4: Giving Generously

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Annual Budget Drive

- **Conduct a Commitment Sunday**
- **Have stewardship conversations with all leadership donors**
- **Orientation workshops**
- **Phone calls and e-mail for all others**
- **Clean-up donor and alumni data bank**
- **Conduct a close-out meeting**

Phase 5: Applying Recent Learnings

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Annual Budget Drive

- **Conduct cottage meetings**
- **Have stewardship conversations with all leadership donors**
- **Orientation workshops**
- **Phone calls and e-mail for those not attending a cottage meeting**
- **Clean-up donor and alumni data banks**
- **Hold a close out meeting**

Questions?

Review Workshop Goals

- **Introduce new vocabulary**
- **Share new stewardship development program**
- **Describe five phases**
- **Present ABD component of each phase**
- **Questions and answers**

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